

**PLUS
MARKETING**
Is music video
more than MTV?

- Industry, cities inch toward rapprochement
- Cablevision Systems installs troika at top
- FNN strikers return, but issues unresolved
- Duran Duran rocks Cinemax/MTV in combo deal

CableVision™

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...s and features weekly of the cable television industry

April 30, 1984

CABLEVISION
SUSAN GARNER
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*Music video:
Cable spawns a multimediam*



CABLE AND CITIES GET TOGETHER?

The industry and cities move ever closer to an agreement over national cable legislation, as congressmen spar over a provision related to telcos.

CINEMAX, MTV, HAVE THIS DANCE

In the first arrangement of its kind, HBO's Cinemax and MTV have teamed up to share licensing fees for a filmed version of the new Duran Duran concert tour.

MSO JUGGLES TOP DOGS

MSO and pay TV programmer Cablevision Systems Corp. undergoes further top management changes, led by the creation of

a three-man office of the president. The executive reformation comes less than a month after the company named a new president and chairman.

VIDEOTEX '84 PONDER'S FUTURE

Videotex '84 draws a large crowd to Chicago to debate where the future lies for the nascent industry and to see the debut of Keyfax interactive information service.

FNN STRIKE ON HOLD

The Financial News Network unexpectedly terminated negotiations with striking NABET workers. The union has suspended its strike awaiting the outcome of a decertification election.

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Representatives of Country Music TV, BET's *Video Soul* and WTBS' *Night Tracks* respond to opinions expressed at *CableVision Plus* video music roundtable. Their common view: look for a burst of new 24-hour clip channels when the urban cable franchise process ends.

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Advertisers looking for a way to reach the tough-to-get 18 to 34-year-old crowd are beginning to spend more money in music-video programming services such as MTV, *Night Tracks* and *Night Flight*.

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Will Warner Amex cash in on the current popularity of MTV and take part of its Satellite Entertainment Co. unit public? Financial analysts offer mixed assessments of that plan's chances for success.

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MTV's brand of television violence features a battle between the sexes, claims the National Committee on Television Violence.

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About the cover

Art Director Brad Hamilton evokes a new wave look to tell the music video story. Clockwise, starting at upper left: Michael (Thriller) Jackson; The Eurythmics' Annie (Sweet Dreams Are Made of This) Lennox; Culture Club's (Karma Chameleon) Boy George; and David (Let's Dance) Bowie.

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PLUS

Music Video: What's it all about?

Cable has created a phenomenon called music video. Everyone within a mile of a TV set knows that. But how will the genre develop, and to what extent? A panel of experts assembled for a special *CableVision Plus* roundtable agrees that the "synergy" among various media—cable, home video, broadcast, etc.—has transformed the nascent video music industry into a true multimediam. MTV wizard Bob Pittman and other experts muse about the medium's development and its promise to the industry and to its viewers.

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CABLE STATS

Cable Industry Growth Chart

YEAR	TVHH	Homes Passed	Basic Subscribers	% of TVHH	Pay Subscribers	% of TVHH
1990E	93,900,000	81,783,000	50,706,000	54	32,959,000	35
1989E	92,800,000	79,109,000	48,256,000	52	30,883,000	33
1988E	91,000,000	75,833,000	45,500,000	50	28,665,000	32
1987E	89,300,000	71,137,000	41,971,000	47	26,022,000	30
1986E	87,800,000	68,121,000	39,510,000	45	24,101,000	27
1985E	86,000,000	64,500,000	36,120,000	42	21,672,000	25
1984E	84,600,000	59,989,000	32,994,000	39	19,764,000	23
1983	83,500,000	53,641,000	30,300,000	36	17,877,000	21
1982	82,800,000	49,100,000	28,200,000	34	15,898,000	19
1981	80,700,000	44,000,000	22,596,000	28	11,804,000	15
1980	77,800,000	37,300,000	18,672,000	24	7,760,000	10
1979	76,300,000	32,700,000	16,023,000	21	5,341,000	7
1978	74,500,000	27,200,000	14,155,000	19	2,980,000	4
1977	73,300,000	24,894,000	13,194,000	18	1,466,000	2
1976	71,114,000	21,989,000	12,094,000	17	505,000	1
1975	69,600,000	19,900,000	11,136,000	16	N/A	N/A

Source: CableProfile Data Base, INTERNATIONAL COMMUNICATIONS RESEARCH

Cable barometer

Television households (TVHH) .. 83,775,000

Homes passed by cable (HP) 54,500,000

Percent of TVHH passed by cable 65.1%

Basic cable subs. 30,700,000

Percent of TVHH with basic cable .. 36.7%

Percent of HP with basic cable .. 56.3%

Pay cable subs. 18,300,000

Percent of TVHH with pay cable 21.8%

Percent of HP with pay cable 33.6%

Percent of basic subs with pay cable 59.6%

Figures are as of March 30, 1984
Source: CableProfile Data Base, INTERNATIONAL COMMUNICATIONS RESEARCH

Franchising calendar

This chart examines the franchise status of communities since March 1984.

Arizona

Apache Junction—award to Dowden Communications 4/5/84 (6,837 homes)

California

Avalon—proposals received from Catalina Cable TV, T&B Communications and The Western Co. award expected 5/84 (1,500 homes)

Chino—only proposal received from Buena Vista Cable TV (12,000 homes)

Claremont—negotiating with Group W (9,800 homes)

Commerce—negotiating with KTS Corp. (3,000 homes)

Costa Mesa—award to Copley-Colony Cablevision 3/5/84 (32,637)

Durante—consultants reviewing proposals from KTS Corp., Buena Vista Cable and Public Service Cable (7,100 homes)

East San Fernando Valley—award to United Cable 9/16/83 (166,000 homes)

East Yolo—proposals submitted by Cablevision, Sonics, Yolo Communications, and Federal Communications Inc. (110,000 homes)

La Puente—only proposal submitted by United Cable (8,600 homes)

Lomita—award to Colony Communications 9/6/83 (8,137 homes)

Los Altos—negotiating with United Cable TV, award expected 5/84 (9,000 homes)

Los Angeles—award to Community Cable Entertainment Services System 9/16/83 (180,000 homes)

Norco—award to Falcon Cable of Riverside 9/21/83 (6,300 homes)

Palo Alto—proposals received from Century Federal, City Cable Partners, Pacific Telephone, Marsh Media/Public Service Cable and Cable Communications Co-op of Palo Alto (22,000 homes)

Pico Rivera—award to Rogers California Cable System 4/2/84 (15,500 homes)

Piacenta—award to Group W 2/7/84 (1,200 homes)

Sacramento—award to Cablevision Systems 11/22/83 (360,000 homes)

San Gabriel—negotiating with Falcon Communications (11,600 homes)

South Monrovia—RFP re-issued, proposals due 3/84 (5,450 homes)

Sunnyvale—re-franchising award to Sunnyvale Cable TV 2/14/84 (43,000 homes)

West Covina—award to Falcon Communications (28,000 homes)

Yorba Linda—deadline extended for statements of interest (12,000 homes)

Colorado

Larimer County—award to Cable Systems 8/22/83 (1,500 homes)

Loveland—award to Scripps Howard 9/26/83 (1,000 homes)

Delaware

Wilmington—accepting proposals from cable consultants to review current system (140,000 homes)

District of Columbia

proposals received from D.C. Telecommunications Development Corp., Capital City Cable and District Cablevision Inc. (254,000 homes)

Florida

Fellsmere—proposals received from Private Cable and Sci Ad

Torre Verde—award to Centel 8/9/83 (2,000 homes)

Illinois

Chicago—final awards granted to four of five areas. Area I proposals under review (300,000 homes). Area II award to Group W (217,000 homes). Area III award to Group W (193,000 homes). Area IV to Chicago Cable Communications (TCI/Cross Country joint venture) (226,000 homes). Area V to Continental Cablevision (188,000 homes)

Countryside—preliminary award to Cablevision of Chicago (2,200 homes)

Elmhurst Park—drafting RFP (9,500 homes)

Harwood Heights—award to Metro/ision 10/11/83 (2,000 homes)

Naperville—RFP re-issued (7,000 homes)

St. Charles, Geneva—award to Centel 2/21/84 (10,000 homes)

Villa Park—negotiating with Multimedia (7,100 homes)

Wheaton—negotiating with Centel, award expected by 5/84 (16,000 homes)

Winnetka—decision to have cable has been postponed (13,000 homes)

Woodbridge—negotiating with Multimedia (260 homes)

Iowa

Clearfield—award to Altco Cablevision 9/20/83 (150 homes)

Diagonal—award to Altco Cablevision 8/30/83 (200 homes)

Morning Sun—drafting RFP (450 homes)

Murray—award to Altco Cablevision 8/30/83 (280 homes)

Kentucky

Caloway County—award to Bluegrass 12/13/83

Danville—award to RV Cablevision 1/13/84 (12,800)

Fulton—RFP re-issued (2,400 homes)

Greenville, Central City and Muhlenburg County—award to TCI 1/84 (13,000 homes)

Loretto—RFP deadline extended

Mayfield—franchise renewal granted to ATC 9/83 (4,500 homes)

Maine

Harpwell—award to Video Vision 8/18/83 (2,800 homes)

Hemlock—award to Maine Cable Co. 8/17/83 (1,062 homes)

Maryland

Baltimore—RFP deadline extended until 3/28/84 (302,000 homes)

Carroll County—award to Prestige Cable 10/14/83 (30,000 homes)

Easton—City Council approved municipal ownership 6/83, construction to start by 11/83 (36,000 homes)

Massachusetts

Belchertown—no responses to RFP

Belmont—exploring municipal ownership of cable

Berkley, Dighton, Freetown—proposals submitted by Continental Cablevision

Boxborough—proposals submitted by Nashoba Communications and Adams-Russell (31,000 homes)

Boylston—award to Boylston Municipal Light Co. 1/9/84 (1,200 homes)

Cambridge—expect RFP issuance 6/84 (43,000 homes)

Dedham—preliminary award to Bay Cable TV

East Bridgewater—award to Campbell Communications denied award, Campbell is appealing (2,500 homes)

Easton—award to Continental Cablevision 1/9/84

Groton—proposals submitted by Nashoba Cable, Northeast Cable TV and United Cable

Hamilton and Wenham—award to Continental Cable 3/5/84 (2,300 homes)

Holden—award to Greater Worcester Cablevision 3/5/84 (4,000 homes)

Holliston—preliminary award to Massachusetts Cablevision Systems Inc. (392,200 homes)

Lincoln—proposals received from Adams-Russell, New Communications Corp. and TeleCommunications Inc. preliminary award expected 4/84 (1,700 homes)

Maldenhead—restarting franchising process

Medford—only proposal from Massachusetts Cablevision (3,400 homes)

Mendon—restarting franchise process (1,200 homes)

Middleborough—proposals from Middleborough Gas & Electric, Continental Cablevision and Campbell Cable Systems

Nahant—only proposal from Warner Amex, no action until summer 1984 (1,433 homes)

Norfolk—award to Massachusetts Cable 4/2/84 (1,880 homes)

Pembroke—award to Campbell Communications 10/83 (3,500 homes)

Pleasant—award to United Cablevision of Connecticut 10/11/83 (2,800 homes)

Plympton—award to Campbell Communications 2/13/84 (650 homes)

Sandwich—only proposal received from Campbell Communications (5,000 homes)

Seekonk—preliminary award to Massachusetts Cablevision (6,000 homes)

Shirley—proposals submitted by United Cablevision and Nashoba Communications (1,827 homes)

CABLE STATS

Southborough—only proposal from Worcester Cablevision
Sterling—proposals received from Wachusett Cablevision and Sterling Electric Light Co. award expected 6/84 (2,000 homes)
Stow—only proposal received from Adams Russell (1,600 homes)
Tewksbury—award to Nashoba Communications 11/83 (2,306 homes)
Upton—only proposal received from Worcester Cablevision Inc. (1,600 homes)
Walpole—award to Massachusetts Cablevision 10/83 (5,676 homes)
Wayland—proposals under review, award expected by 7/83 (3,500 homes)
West Bridgewater—award to Continental Cablevision 11/78 (2,000 homes)
Westminster—preliminary award to Adams Russell 12/83 (1,000 homes)
Woburn—proposals received from Adams Russell, Continental Cable Cooperative, Waylen Cable Cooperative and Kabla Bowen
Westport—preliminary award to United Cablevision Funding appealed by Westport Cable Television (5,500 homes)

Michigan

Bloomfield Township, Bloomfield Hills—award to Booth Communications 9/12/83 (15,000 homes)
Detroit—award to Barron Cablevision Systems, Monroe Cablevision
Homer Township—negotiating with Getty TV, award expected 5/84
Jerome Township—award to Whitney Cablevision
Lake Orion—proposal submitted by Tribune United, Concord Telecommunications and Multi-Cablevision
Monroe—City Council awarded franchise to Communication and Cablevision Inc. to compete with existing franchised cable system, Monroe Cablevision
West Bloomfield, Keego Harbor, Orchard Lake, Sylva Lake—negotiating with Continental Cablevision (16,437 homes)
West Oakland County—award to Greater Media 11/23/83 (32,581 homes)
Westland—award to Continental Cablevision 2/84 (29,000 homes)

Minnesota

Alton, Cottage Grove, St. Paul Park, Denmark, Grey Cloud, Newport, Woodbury, South Washington County Cable Commission—award to Telephone and Data Systems 1/13/84 (12,654 homes)
Albertville, St. Michael—award to Carlos Padraja 10/83 (16,373 homes)
Arlington, Gaylord, Winthrop, Gibbon, Green Isle—award to Dowden Communications 9/9/83 (2,569 homes)
Alway—award to Armo Communications 8/83 (463 homes)
Belle Plaine—RFP issued, award due 5/3/84 (5,227 homes)
Big Lake, Buffalo, Coakato, Jelano, Elk River, Monticello, Rockford, Watertown, Maple Lake—proposals received from Rite Cable and Dow-Sat Cable of Minnesota
Blaine, Centerville, Circle Pines, Coon Rapids, Lexington, Ham Lake, Spring Lake (North Central Suburban Cable Communications Commission)—award to Group W 9/9/83 (27,191 homes)
Broomfield—award to Armo Communications 8/83 (297 homes)
Chanhassen, Carver County and Hennepin County—award to Dowden Communications 1/5/84
Clarkfield—award to DeSutter Cablevision 10/83 (475 homes)
Deer River—award to Deer River Tel. Co. 9/83 (373 homes)
Dodge Center—award to Dowden Communications 9/9/83 (700 homes)
Eagle Bend—award to Parker's Prairie Tel. Co. 9/83 (517 homes)
Foley—award to Western Communications 10/83 (575 homes)
Forest Lake, Forest Lake Township, Columbus Township, Scandia Township—award to Citation Cable 11/83 (5,619 homes)
Grand Marais—award to Cable Tron 9/9/83
Grove City—award to Armo Communications 8/83 (248 homes)
Hendrum—award to Ada Cable 8/83 (147 homes)
Heron Lake—award to B&R Electronics 10/83 (313 homes)
Lewiston—award to Telecommunications 10/83 (475 homes)
Maple Plain—proposals submitted by Dowden Communications and Rite Cable Company of Minnesota (457 homes)
Menasha—award to Western Cablevision 8/83 (400 homes)
Minneapolis—Storer in north sold to Rogers in south 8/83 (170,000 homes)
Minnetonka, Spring Park, Shorewood, Medina, St. Bonifacius, Excelsior, Deephaven, Woodland, Victoria, Tonka Bay, Orono, Minnetonka Beach, Greenwood, Long Lake, Lake Minnetonka Cable Communications Commission—award to Dowden Communications 12/19/83 (11,662 homes)
New Richmond—award to Western Communications 10/83 (503 homes)
Northfield, Northfield Twp., Dundas, Bridgewater Twp., Rice County, Waterford Twp. (Dakota County)—award to Nor Com Video 12/9/83 (4,416 homes)
Oakport Township—award to Spectrum Communications 10/83 (200 homes)
Okiee—award to Garden Valley Tel. Co. 10/83 (242 homes)
Parker's Prairie—award to Mid West Tel. Co. 10/83 (400 homes)
Savage—drafting RFP (272 homes)
Stillwater, Bayport, Oak Park Heights, Central St. Croix Valley area—award to Telephone and Data Systems 6/12/83 (6,000 homes)
Trompsburg—award to Terti Tel. Co. 10/83 (381 homes)
Wabasso—award to Star Gazers 10/83 (301 homes)
Waconia—beginning process (1,024 homes)
Wayzata—award to Dowden Communications (1,800 homes)
Wind St. Paul—proposals received from Continental Cablevision and Rite Cablevision (24,032 homes)
Winnetka—plan municipal ownership (1,600 homes)

Missouri

St. Louis—award to STL Cablevision Partners Inc. (75% of city) and St. Louis City Communications (25% of city) 4/11/84 (178,000 homes)

Nebraska

Barncroft—award to Midlands 12/5/83 (350 homes)

New Hampshire

Hampstead—final award to Rockingham Cablevision (1,500 homes)
Manchester—no proposals submitted by deadline
Newton—negotiating with Harron Communications (1,124 homes)
Pelham—negotiating with Harron Communications (2,500 homes)
Sandown—only proposal from Harron Co. (800 homes)
Wifeboro—negotiating with Community TV (833 homes)

New Jersey

Jersey City—determining cable options
Paterson—plan municipal ownership (55,000 homes)

New York

Breaston—Dutchess County Cablevision submitted only proposal (2,100 homes)
Mayville—award to U.S. Cable 9/26/83 (5,430 homes)
Mt. Upton—NewChannels denied award, future uncertain
New York City—final awards for outer boroughs 6/30/83: Warner Amex—Western Brooklyn, Northern Queens, Cablevision Systems—Eastern Brooklyn, Bronx, Cox Cable and Vision Cable—Staten Island, ATC—areas of Queens, Queens Inner Unity Cable—Southern Queens
North Salem—RFP re-issued, deadline extended until 5/31/84 (1,100 homes)
Norwich—NewChannels withdrew application, exploring other alternatives (100 homes)
Portland—negotiating with Tribune Cable (150 homes)
Tully—award to NewChannels 8/29/83
Union Vale—only proposal from Consolidated Communication (775 homes)

North Carolina

Candler County—drafting RFP
Jackson—statements of interest being accepted (400 homes)
Pamlico County—award to County Cablevision 10/17/83 (4,000 homes)

Ohio

Avon—preliminary award to Space Cable of Ohio (2,000 homes)
Batavia Township—award to So-Comm 9/20/83 (4,000 homes)
Bethel—award to Cable Management Group 9/19/83 (1,200 homes)
Brooklyn—municipal ownership under consideration (4,000 homes)
Cleveland—city still deliberating municipal versus private ownership
Garfield Heights—award to Space Cable 9/23/83 (12,000 homes)
Lorain—deliberating municipal versus private ownership
Oberlin—proposals received from Oberlin Cable Co-Op and Grafton Cable, award expected 2/84 (2,600 homes)
Quincy—final award granted to Cable Management Group 8/83 (250 homes)
Sylvania—award to Cablevision of Geauga 9/14/83 (1,500 homes)

Oregon

Amity—award to Eagle Cable Systems Inc. 1/9/84 (400 homes)
Cottage Grove—award to McCaw Communications (2,500 homes)
Dunthorpe—negotiating with Liberty Communications (TCI) (507 homes)
Sylvan—negotiating with Liberty Communications (TCI) (1,200 homes)

Pennsylvania

Franklin Township—preliminary award to Southcom Cable
Philadelphia—city is divided into four areas with proposals submitted as follows: Area 1—Greater Philadelphia Cablevision and Independence Cable of Philadelphia; Area 2—Independence Cablevision, Waste Communications and Philadelphia Inner City Cable Systems; Area 3—Rollins Cablevision, Independence Cablevision, Cox Cable and Comcast Communications; Area 4—Rollins Cablevision, Comcast Communications and Cablevision Systems, new administration waiting from assessment of current proposals (each area 155,000 homes)

Rhode Island

Newport (Middletown, Portsmouth, Tiverton, Little Compton)—reviewing proposals (29,500 homes)

Texas

Arlene—proposals received from Teftian and Southern Cablevision Corp. (22,000 homes)
Piano—award to Tritel Cable 8/83 (30,000 homes)

Virginia

Berryville—Clarke County—negotiating with Berryville TV Cable Co. (600 homes)
Dinwiddie County—award to Orator General Communications 11/2/83
Manassas—considering municipal ownership of cable (5,510 homes)
Suffolk—award to Suffolk Cable Communications 2/1/84 (16,697 homes)

Washington

Everett, Trippish, Wapato, Zillah—award to McCaw Communications 9/83 (3,300 homes)

Wisconsin

Hayward—no bids submitted (1,000 homes)
Hudson—award to Telephone and Data Systems 11/21/83
Hustford—award to Cable Communications Corp. 12/5/83 (350 homes)
Johnson Creek—award to Telecatalyst of Milwaukee 9/83 (400 homes)
New Glarus—negotiating with Teledata Systems, award expected 4/84 (675 homes)
Waterford—negotiating with Total TV (600 homes)

Wyoming

Groette—Wrestle withdrew bid, negotiating with Televents (7,500 homes)

Source:

Fitch Communications Inc.

Franchising in the top 50 markets

Rank	Market	Status of core city	Rank	Market	Status of core city	Rank	Market	Status of core city
1	New York	Manhattan—2 OP, outer boroughs 8 FG	21	Sacramento	FG, OP	42	Oklahoma City	Two systems, OP
2	Los Angeles	City is divided into 14 areas (A-I), 10 OP, 2 UC, 2 FG	22	Stockton	Two systems, OP	43	Louisville	Two systems, OP
3	Chicago	City is divided into five areas, Area 1 FP	23	Indianapolis	Three systems, OP	44	Salt Lake City	OP
4	Philadelphia	Areas II, III, IV, V FG, City is divided into N, SE, W, FP, additional area in S-OP	24	Portland	Three systems, OP	45	San Antonio	OP
5	San Francisco	OP, system to be upgraded	25	Pasadena	Two systems, OP	46	Charleston	Two systems, OP
6	Boston	OP	26	New Haven	Two systems, OP	47	Norfolk, Newport News, New Hampton, Portsmouth	Four systems, OP
7	Detroit	FG	27	Cincinnati	OP	48	Harrisburg, York, Lebanon, Lancaster	Four systems, OP
8	Washington, D.C.	FP	28	Kansas City	OP	49	Wicks, Barre	Two systems, OP
9	Cleveland	FP	29	Milwaukee	UC	50	Syracuse	Two systems, OP
10	Dallas-Ft. Worth	Two systems, OP	30	Nashville	OP		Albany, Schenectady, Troy	Three systems, OP
11	Houston	Two systems, OP	31	Charlotte	OP			
12	Pittsburgh	OP	32	Buffalo	OP			
13	Miami	OP	33	Providence	OP, OP			
14	Seattle-Tacoma	City is divided into five parts, (4 OP), 1 BP, Tacoma OP	34	New Bedford	OP, OP			
15	Minneapolis	OP, FG	35	Orlando	Two systems, OP			
16	Atlanta	OP	36	Daytona Beach	Two systems, OP			
17	St. Louis	FG	37	New Orleans	OP			
18	Tampa	UC, OP	38	Memphis	Four systems, OP			
19	St. Petersburg	UC, OP	39	Columbus	Three systems, OP			
20	Denver	FP	40	Greenville, Asheville, Spartanburg	Three systems, OP			
21	Baltimore	FP	41	Grand Rapids	Three systems, OP			
				Kalamazoo, Battle Creek	Three systems, OP			
				Birmingham	OP			
				Raleigh-Durham	Two systems, OP			

Source: Fitch Communications Inc.